# ITIL 4 Foundation Summary (v2)

5 marks

## KEY CONCEPTS AND DEFINITION

**Service Management:** A set of specialized organizational capabilities for enabling value for customers in the form of services.

**Value:** The perceived benefits, usefulness, and importance of something.

**Organization:** A person or a group of people that has its own functions with responsibilities, authorities, and relationships to achieve its objectives.

**Customer:** A person who defines the requirements for a service and takes responsibility for the outcomes of service consumption.

**User:** A person who uses services.

**Sponsor:** A person who authorizes budget for service consumption.

**Service:** A means of enabling value co-creation by facilitating outcomes that customers want to achieve, without the customer having to manage specific costs and risks.

**Product:** A configuration of an organization's resources designed to offer value for a consumer.

**Service offering:** A description of one or more services, designed to address the needs of a target consumer group.

- **May include** goods, access to resources, and service actions.

**Service relationship:** A cooperation between a service provider and service consumer.

- **It includes** service provision, service consumption, and service relationship.

**Output:** A tangible or intangible deliverable of an activity.

**Outcome:** A result for a stakeholder enabled by one or more outputs.

**Cost:** The amount of money spent on a specific activity or resource.

**Risk:** A possible event causing difficulties, alternatively uncertainty of outcome.

**Utility:** What the service does (fit for purpose) (functionality)

**Warranty** - How well it does it (fit for use) (service level)

- Availability, Capacity, Security, Continuity.

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## The 4 DIMENSIONS OF SERVICE MANAGEMENT

### Organizations and People

- Organizational Structures.
- Decision making habits.
- Staffing and skill requirements.
- Culture and leadership styles.

### Information and Technology

- Information and knowledge needed.
- protected, managed, archived, disposed Info.
- Relationship between components.
- Impact of organization culture on technology.

### Partners and suppliers

- Relationship with other organizations.
- Factors that influence supplier strategies.
- Organization's partner and supplier strategy.
- Service integration and management.

### Value Streams and Processes

- Activities the organization undertakes.
- Organization of these activities (Workflows).
- Ensuring value to stakeholders.
- Examine value stream mapping.

**Value Streams:** Steps to create and deliver products and services to consumers.

**Processes:** Activities that transform inputs into outputs.

**Partner:** Flexible partnerships where parties share common goals and risks, and collaborate to achieve desired outcomes.

**Supplier:** Formal contracts with clear separation of responsibilities.

***External factors:*** *Political, Economic, Social, Technological, Legal, and Environmental. (**PESTLE** model)*

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## Service Value Streams (SVS)

**Describes** how all the components and activities of the organization work together as a system to enable value creation.

**Purpose:** Ensure that the organization continually co-creates value with all stakeholders through the use and management of products and services.

**Include:** Guiding principles, Governance, Service value chain, Practices, Continual improvement.

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## GUIDING PRINCIPLES

A recommendation that guides an organization in all circumstances, regardless of changes in its goals, strategies, type of work, or management structure.

A guiding principle is universal and enduring.

| PRINCIPLE | APPLYING |
|---|---|
| 1. **Focus on value.** | • Know how service consumers use each service.<br>• Encourage a focus on value among all staff.<br>• Focus on value during all activities.<br>• Focus on value in every step of improvement initiative. |
| 2. **Start where you are.** | • Look at what exists as objectively as possible.<br>• Determine if you can replicate or expand upon successful practices and services to achieve the desired state and how.<br>• Apply your risk management skills.<br>• Recognize that nothing from the current state can be re-used. |
| 3. **Progress iteratively with feedback.** | • Comprehend the whole, but do something.<br>• The ecosystem is constantly changing, so feedback is essential.<br>• Fast does not mean incomplete. |
| 4. **Collaborate and promote visibility.** | • Collaboration does not mean consensus.<br>• Communicate in a way the audience can hear.<br>• Decisions can only be made on visible data. |
| 5. **Think and work holistically.** | • Recognize the complexity of the systems.<br>• Collaboration is key to thinking and working holistically.<br>• Where possible, look for patterns in the needs of and interactions between system elements.<br>• Automation can facilitate working holistically. |
| 6. **Keep it simple and practical.** | • Ensure value.<br>• Simplicity is the ultimate sophistication.<br>• Do fewer things, but do them better.<br>• Respect the time of the people involved.<br>• Easier to understand, more likely to adopt.<br>• Simplicity is the best route to achieving quick wins. |
| 7. **Optimize and automate.** | • Simplify and/or optimize before automating.<br>• Define your metrics.<br>• Use the other guiding principles when applying this one:<br>  ○ Progress iteratively with feedback.<br>  ○ Keep it simple and practical.<br>  ○ Focus on value.<br>  ○ Start where you are. |

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## SERVICE VALUE CHAIN

**An** operating model which transforms demand into actual value.

1. **Plan:** Ensure a shared understanding of the vision, current status and direction.
2. **Improve:** Ensure continual improvement of products, services, and practices.
3. **Engage:** Provide a good understanding of stakeholder needs and demands.
4. **Design & transition:** Ensure services continually meet stakeholder expectations.
5. **Obtain/build:** Ensure components are available when and where needed.
6. **Deliver & support:** Ensure services are delivered and supported according to agreed specifications.

## PURPOSE AND KEY TERMS OF 8 PRACTICES*

**Practice:** A set of organizational resources designed for performing work or accomplishing an objective.

| Practice | Purpose | Key terms |
|---|---|---|
| **Information security management** | Protect the information needed by the organization to conduct its business. | • Confidentiality<br>• Integrity<br>• Availability<br>• Authentication<br>• Non-repudiation<br>CIA |
| **Relationship management** | Establish and nurture links between the organization and its stakeholders at strategic and tactical levels. | Identification > Analysis > Monitoring > improvement |
| **Supplier management** | Manage suppliers to ensure seamless delivery of products and services | |
| **IT asset management** | Plan and manage the full lifecycle of IT assets. | **IT Asset:** any financially valuable component that can contribute to delivery of an IT product or service. |
| **Monitoring and event management** | Observe, record and report changes of state. | **Event**: any change of state that has significance for the management of a service or other configuration item (CI).<br>*Events Type:*<br>Informational, Warning, Exception. |
| **Release management** | Make new and changed services and features available for use. | **Release**: A version of a service or other configuration item, or a collection of configuration items, that is made available for use. |
| **Service configuration management** | Accurate and reliable information about services and CIs when and where it's needed. | **Configuration Item (CI):** Any component that needs to be managed to deliver an IT service. |
| **Deployment management** | Move new or changed components to live environments. | **Definitive media library**: for software and documentation.<br>**Definitive hardware store**: for hardware components |

** You are required to understand the 'purpose' and key terms used in 8 of the ITIL practices*

# 7 PRACTICES IN DETAIL*

## Continual Improvement

**Purpose**: Align the organization's practices and services with changing business.

- Continual Improvement happens everywhere in the organization (SVS, SVC, Practices).
- Ideas need captured, documented, assessed, and prioritized. Continual Improvement Register (CIR).
- It is a responsibility of everyone.
- Organizations may have a Continual Improvement Team for better coordination.
- All 4 Dimensions need to be considered during any improvement initiative.

**The continual improvement model:**

1. What is the vision?
2. Where are we now?
3. Where do we want to be?
4. How do we get there?
5. Take action.
6. Did we get there?
7. How do we keep the momentum going?

## Change Enablement

**Purpose**: Maximize the number of successful changes by ensuring that risks have been properly assessed, authorizing changes to proceed, and managing a change schedule.

**Change:** The addition, modification, or removal of anything that could have a direct or indirect effect on services.

Change Types:

1. **Standard**: low-risk, pre-authorized changes.
2. **Normal**: Need to be scheduled, assessed, and authorized.
3. **Emergency**: Must be implemented as soon as possible.

## Incident Management

**Purpose**: Minimize the negative impact of incidents by restoring normal operation as quickly as possible.

**Incident:** An unplanned interruption to a service or reduction in the quality of a service.

- Every incident should be logged, prioritized, and managed through their lifecycle.
- Incidents may be resolved by people in many different groups based on the incident category.
- Major incidents, often require a temporary team to work together to identify the resolution.
- **Swarming**: Technique that involves many different stakeholders working together initially…

## Problem Management

**Purpose**: Reduce the likelihood and impact of incidents by identifying root causes and eliminates those.

**Problem**: A cause, or potential cause, of one or more incidents.

- **Known Error:** A problem with a known root case and has not been resolved.
- **Workaround**: Alternate solution to reduces or eliminates the impact of an incident.
- **Three phases:** Problem identification > Problem control > Error control

## Service Desk

**Purpose**: Capture demand for incident resolution and service requests. Single point of contact for the service provider with all of its users.

The focus should be on people and business, not technical issues

Need customer service skills:

1. Incident analysis and prioritization.
2. Understand business priority.
3. Effective communications.
4. Emotional intelligence.
5. Empathy.

## Service Level Management

**Purpose**: Set clear business-based targets for service performance, so that the delivery of a service can be properly assessed, monitored, and managed against these targets.

**Service level:** One or more metrics that define expected or achieved service quality.

- This practice involves the definition, documentation, and active management of service levels.
- **Service level agreement (SLA):** Agreement between a service provider and a customer.

**Successful SLAs:**

- Relate to a defined 'service' in the service catalogue.
- Defined outcomes and not simply operational metrics.
- Involve all stakeholders including partners, sponsors, users, and customers.
- Simply written and easy to understand for all parties.

## Service Request Management

**Purpose**: Support the agreed quality of a service by handling all pre-defined, user-initiated service requests in an effective and user-friendly manner.

**Service Request:** A request from a user or user's authorized representative that initiates a service action that has been agreed as a normal part of service delivery.

- Steps to fulfil request should be well knowing (for both simple and complex requests).
- When defining new workflows, try to reuse already existing ones.
- User expectations must be managed in regards of what can be delivered.

** The ITIL4 Foundation course syllabus says that you will be expected to understand the following 7 ITIL Practices in detail.*